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Washington, D.C. 20250

WEEKLY ROUNDUP OF WORLD PRODUCTION AND TRADE

WR 18-83

WASHINGTON, May 4--The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

## EC TRADE NOTES

The EUROPEAN COMMUNITY (EC) is apparently implementing a strategy to restrain soft wheat and flour exports in 1982/83 (August-July). However, plans under discussion to support the local wheat market in the face of projected additional carryover supplies could mean sharply higher wheat export volumes in 1983/84, particularly in the beginning of the new year. Among the plans under consideration is the early opening of 1983/84 export tenders, which would enable exporters to make new year commitments for delivery beginning in August. That action, however, will simply defer current export pressures from the 1982/83 year to the beginning of next year, and in fact, could exacerbate 1983/84 export pressures if the new crop is near the size of last year's harvest.

Other EC plans include the transfer of intervention stocks from member states with the greatest supply to those in a deficit position (Italy and Iceland) and implementation of a subsidized scheme to move 1-2 million tons of wheat into feed. Both the stock transfer and the subsidy schemes could result in lower imported feed grain demand (the United States provides more than 90 percent of the EC's imported corn) as well as increased pressure to export barley displaced in feed rations by the subsidized wheat.

## OILSEEDS AND PRODUCTS

BRAZIL's Council of Foreign Trade (Concex) has approved measures to stimulate agricultural exports, including re-introduction of the drawback policy, which was suspended last year. Under the drawback, soybeans can be imported for crushing as long as the meal and oil are exported. This would mean more imports of soybeans and increased exports of soybean meal and oil. Steps approved include: measures to insure that the full benefit of subsidized interest under Resolution 674 is made available to exporters, not absorbed by lending banks; the Ministry of Finance will study exempting the Bank of Brazil's export financing in cruzeiros from the bank's credit ceiling; imports under drawback operations will not require prior authorization from the Bank of Brazil if they meet certain requirements. Additionally, Brazilian firms will be able to import the equivalent of 50 percent more than their 1983 import ceilings from socialist countries, a measure designed to reduce Poland's debt to Brazil.

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Concex also established various study groups, the most important of which will have 30 days to propose measures to stimulate agricultural exports. The objectives of the study include an increase of 10 million tons in soybean and corn production, as well as increased output of peanuts, sunflowerseed and meats.

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JAPAN's Ministry of Agriculture, Forestry and Fisheries is projecting an increase in daily nutritional supply levels. In view of the expanded nutritional targets and Japan's limited capacity to expand domestic oilseed output, soybean imports are expected to expand to 4.8 million-5.0 million tons by 1990, compared with 4.26 million tons in 1978. The targeted daily nutritional supply levels are as follows in grams per capita:

Items	1978	1990	Percent Change
<b>Protein:</b>			
Animal protein	39	45	+ 15
Livestock products	21	24	+ 14
Fish products	18	21	+ 17
Vegetable protein	42	39	- 7
Total	81	84	+ 4

The bulk of Japanese meal and oil usage is in the form of oilseed imports. Actual calendar year imports for recent years are as follows in million tons.:

Year	Soybeans		Rapeseed	Other	Total Oilseeds
	From U.S.	Total			
1978	4.14	4.26	.82	.42	5.50
1979	3.84	4.13	1.12	.39	5.64
1980	4.23	4.40	1.06	.44	5.90
1981	4.02	4.20	1.17	.38	5.75
1982	4.20	4.34	1.20	.42	5.96

\*\*\*\*\*

GERMAN DEMOCRATIC REPUBLIC imports of high protein meals registered substantial gains in 1982, based on preliminary export data of reporting trade partner countries. Key changes are as follows in 1,000 tons:

Trade Partner	Commodity	Period	1981	1982
Argentina	Sunflower meal	Jan-Sep	98.1	81.2
	Cottonseed meal	Jan-Sep	12.9	0
Brazil	Soybean meal	Jan-Dec	177.0	392.1
	Soybean meal	Jan-Dec	207.9	120.9
United States	Soybean meal	Jan-Dec	305.0	545.2
West Germany 1/	Soybean meal	Jan-Dec	11.8	49.2
Peru	Fish meal	Jan-Dec	812.7	1,188.6

1/ Excludes transshipments through Hamburg.

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BRAZIL's oilseed crushing capacity has expanded sharply in recent years, according to a recently released survey by ABIOVE, the Brazilian oilseed crushers organization. Two new plants are under construction, each having a daily capacity of about 1,000 tons per day. Capacity data are as follows in million tons:

Capacity 1/ (Tons/Day)	1976		1979		1982	
	MT	Percent	MT	Percent	MT	Percent
0-599	5.78	56	5.74	46	6.48	24
600-1,499	2.75	26	3.95	31	7.55	28
Above 1,500	1.89	18	2.88	23	12.96	48
Total	10.42		12.57		27.00	

1/ Based on 300 operating days per year.

Brazil's oilseed crushing capacity is very large in relation to the size of its soybean crop. Data are as follows in million tons:

Region	Crush Capacity	1983 1/ Soybean Production
Rio Grande do Sul	10.4	5.4
Parana	8.8	4.3
Sao Paulo	5.1	1.0
Santa Catarina	2.3	0.6
Others	0.4	3.6
Total	27.0	14.9

1/ Forecast.

In an attempt to utilize existing soybean crushing capacity more fully, Brazil has cut soybean exports in recent years, while expanding soybean imports. During the year ending January 1983, Brazil's soybean exports dropped to only 0.7 million tons, compared with 1.5 million the previous year. During the same period, Brazil's soybean imports, at nearly 1.3 million tons, gained significantly from less than 1.0 million tons a year earlier. Thus, Brazil became a net importer of soybeans.

#### COTTON AND FIBERS

ARGENTINA has suspended its 10-percent export tax on cotton until September 11, 1983. The tax was instituted in July 1982 to ensure adequate domestic cotton supplies following the peso devaluation and to increase needed government revenue. Argentine exports will still remain below last year's levels as the 1982/83 crop now being harvested is smaller than last year and domestic utilization has taken a larger share because peso devaluations have sharply increased prices of imported textiles.

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TOBACCO

During the first two weeks of sales at MALAWI's tobacco auctions, flue-cured prices averaged 1.66 kwachas (US\$1.53) per kilogram, down 14 percent from 1.93 kwachas (US\$1.75) per kilogram during the same period in 1982. Through April 14, 1983, some 1,071 tons of flue-cured tobacco had been sold. Burley sales totaled 2,777 tons during the same period and averaged 1.45 kwachas (US\$1.34) per kilogram, or 46 percent below a year ago.

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JAPAN's Tobacco and Salt Public Corporation (JTS) reports that 1982-83 (April-March) unmanufactured tobacco imports were 79,700 tons, a decline of 5.5 percent from last year. Declining imports are part of JTS' overall effort to reduce large tobacco stocks, currently estimated at around 538,000 tons. The stocks consist of substantial quantities of low-quality domestically produced leaf. Even though tobacco area fell 8.6 percent in 1982, favorable weather boosted leaf production 1.2 percent. Faced with continuing large stocks, moderate increase in production and relatively stable domestic use, a further reduction in tobacco leaf imports is expected during 1983-84.

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NICARAGUA has reportedly signed an agreement with Bulgaria for a joint effort to plant approximately 1,075 hectares of burley and flue-cured tobacco during the 1983-84 crop year. Tobacco produced from this new area, estimated at some 1,800 tons, is expected to be exported to Bulgaria. An additional area of 6,000 hectares is expected to be developed in the second stage of the project. Once in operation, it is expected to provide about 20,000 jobs and generate \$40 to \$50 million in export earnings. Last year's tobacco exports were only \$4.4 million.

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BRAZIL's 1982 tobacco exports are now reported at 166,000 tons, slightly above earlier indications and compared with 148,000 tons in 1981. Exports in 1983 may be off slightly to 160,000 tons due to a smaller crop.

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BRAZIL's 1983 tobacco crop is estimated by the U.S. agricultural counselor at 367,000 tons, 3 percent below last year's harvest. Above normal rains during the growing season in the principal producing areas in southern Brazil reduced leaf quality and caused a 15-percent drop in the southern crop forecast to 285,000 tons. Grower prices for 1983 increased from 1982 at a rate equal to the inflation rate. However, grower returns are 10 to 20 percent less than last year because of the lower leaf quality.

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## FRUITS AND NUTS

Commercial output of dried prunes by MAJOR PRODUCING COUNTRIES in the Southern Hemisphere is forecast to reach only 13,900 tons in 1983, 18 percent below the 1982 volume. Argentina is expected to have only 6,000 tons of dried product available by the end of the current season because of rain damage to the fresh plum crop. A record low outturn is also forecast for Australia, where drought conditions severely stressed plum trees in New South Wales. In contrast, dried prune supplies in Chile and South Africa continued to expand--a reflection of higher producer prices and new plantings coming into production.

Southern Hemisphere raisin supplies for 1983 are expected to fall well below the 1982 level due to a 17-percent drop in Australian output. The cyclical nature of Australia's pack is reflected in the 1983 forecast currently placed at 75,000 tons--69,000 sultanas (81,450 in 1982), and 6,000 lexia raisins (8,750 in 1982). Although dry weather reduced berry size, overall fruit quality appears good with a higher than normal sugar content. Production of raisins and sultanas in South Africa and Argentina is expected to increase for the second consecutive year. A record 25,500 tons is currently forecast for South Africa reflecting favorable weather conditions, remunerative producer prices and an upswing in plantings. Argentine raisin supplies are expected to exceed the 1982 volume by at least one-third due to the greater availability of fresh grapes during the 1983 season as few of these grapes were diverted for wine production. Gradual expansion is also forecast for Chile as more plantings enter production; however, future increases may be tempered by steadily rising production costs.

Production by selected countries in the Southern Hemisphere are as follows in 1,000 tons:

	1981	1982	1983 1/
<b>PRUNES</b>			
Argentina	7.5	9.0	6.0
Australia	2.6	1.2	0.8
Chile	5.0	5.2	5.5
South Africa	1.3	1.5	1.6
Total	16.4	16.9	13.9
<b>RAISINS</b>			
Argentina	5.5	6.0	8.0
Australia	55.8	90.2	75.0
Chile	2.5	2.5	3.0
South Africa	23.9	24.7	25.5
Total	87.7	123.4	111.5

1/ Preliminary.

## SUGAR

WORLD centrifugal sugar production for 1982/83 is estimated at 98.6 million tons (raw value), almost unchanged from last November's estimate of 98.5 million tons and 2 percent below the revised 1981/82 estimate of 100.7 million. A breakdown of sugar production between beet sugar and cane sugar for producing regions is as follows in 1,000 tons:

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	-----1981/82-----		-----1982/83-----	
	Beet	Cane	Beet	Cane
North America	3,204	5,364	2,613	5,341
Caribbean	0	10,147	0	9,110
Central America	0	1,640	0	1,761
South America	189	13,274	278	13,990
European Community	15,945	0	14,768	0
Other Western Europe	2,199	19	2,378	22
Eastern Europe	5,790	0	5,891	0
USSR	6,413	0	6,800	0
Africa	340	6,814	378	7,084
Middle East	1,475	250	1,612	300
Asia	1,231	22,345	1,421	20,793
Oceania	0	4,056	0	4,099
Total above	36,786	63,909	36,139	62,500
Total sugar		100,695		98,639

Although the estimate of total sugar production for 1982/83 remained relatively stable since the first estimate, significant changes have occurred in individual countries. Excessive rains in Cuba during the peak harvest period are expected to reduce output to 7.2 million tons, 700,000 tons below USDA's initial estimate. On the plus side, sugar production in India has been ahead of year-earlier levels due to higher than expected yields. However, production is expected to taper off to 9.0 million tons, up 639,000 tons from the November estimate but still 676,000 tons below the record 1981/82 level.

Sugar output in the USSR is estimated at 6.8 million tons (raw value) from 71 million tons of beets. In Poland, higher sucrose content, higher than expected beet yields and mild harvest weather combined to yield a record 2.0 million tons of sugar, up over 250,000 tons from the previous estimate. In Peru, excessive rains and flooding in the primary cane areas are expected to lower the final outturn for 1982/83 significantly to 450,000 tons, down 300,000 tons from November estimate and down 180,000 tons from the previous year. Production in Brazil, the largest producer, is estimated at 9.3 million tons, down 100,000 from the previous estimate, but still over 900,000 tons above the 1981/82 level.

Record levels of sugar production occurred in several EC countries despite generally smaller harvested areas. A second year of excellent growing conditions resulted in continued high beet yields and higher sucrose levels than during the previous year. The largest change from the November estimate occurred in West Germany. Record beet yields, a higher sugar content and a harvested area larger than earlier expected resulted in over 3.58 million tons of sugar, down only 3 percent from 1981/82 despite an 8-percent smaller area harvested. As a whole, EC production is estimated at 14.8 million tons, up 466,000 from the USDA November estimate, but nearly 1.2 million tons below the 1981/82 record output.

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Noncentrifugal sugar production for SELECTED COUNTRIES in 1982/83 is estimated at 9.4 million tons, compared with 9.0 million last year. India accounts for over two-thirds of this total, with 6.4 million tons, up 400,000 tons from 1981/82 as a result of higher prices. In Pakistan, production for 1982/83 is estimated to be 1.7 million tons, although the total cane area is estimated to have declined nearly 7 percent.

Higher prices for noncentrifugal sugar in Colombia are helping to maintain output at the previous year's level of 710,000 tons despite continued declines in labor for harvesting. Smaller area and reduced yields in Bangladesh combined to reduce the 1982/83 outturn to 535,000 tons, compared to over 600,000 tons the previous year. Noncentrifugal sugar production in Japan and the Philippines remains relatively small at 27,000 and 20,000 tons, respectively.

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WORLD molasses production for 1982/83 is estimated at 33.9 million tons, compared with 34.1 million in 1981/82 and 30.9 million in 1980/81. Brazil is the largest producer--nearly 5.1 million tons, up 553,000 tons from 1981/82 due to the larger cane crop harvested. In India, the second largest producer, molasses output is estimated at 3 million tons, down 400,000 tons from 1981/82 because of the smaller cane harvest. Molasses production in the Soviet Union is estimated to be 2.5 million tons, up from 2.38 million last year due to a larger beet crop. Production in France declined 3 percent to 1.25 million tons. In Thailand, the output is estimated to be 1.27 million tons, down from 1.66 million in 1981/82. Larger sugar crops in China also continue to result in higher molasses production levels. The 1982/83 Chinese molasses output is estimated at 1.3 million tons, up 8 percent from a year earlier.

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Selected International Prices

Item	:	May 3, 1983		Change from	A year
				: previous week	: ago
ROTTERDAM PRICES 1/		\$ per MT	\$ per bu.	\$ per MT	\$ per MT
Wheat:					
Canadian No. 1 CWRS-13.5%.	206.00	5.61	+1.00	201.00	
U.S. No. 2 DNS/NS: 14%...	188.00	5.12	-1.00	188.50	
U.S. No. 2 DHW/HW: 13.5%..	N.Q.	--	--	202.00	
U.S. No. 2 S.R.W.....	162.00	4.41	+3.00	172.00	
U.S. No. 3 H.A.D.....	205.00	5.58	+14.00	185.00	
Canadian No. 1 A: Durum..	222.00	6.04	+14.00	N.Q.	
Feed grains:					
U.S. No. 3 Yellow Corn....	151.00	3.84	+4.00	135.00	
U.S. No. 2 Sorghum 2/.....	N.Q.	--	--	137.00	
Feed Barley 3/.....	N.Q.	--	--	N.Q.	
Soybeans and meal:					
U.S. No. 2 Yellow.....	254.75	6.93	-2.75	268.00	
Brazil 47/48% SoyaPellets 4/	220.50	--	-6.50	N.Q.	
U.S. 44% Soybean Meal.....	218.00	--	-6.00	234.50	
U.S. FARM PRICES 5/					
Wheat.....	136.32	3.71	-1.47	135.22	
Barley.....	78.54	1.71	-4.13	89.56	
Corn.....	119.68	3.04	+1.58	100.39	
Sorghum.....	111.33	5.05 6/	+1.98	93.03	
Broilers 7/.....	946.88	--	+28.66	993.39	
EC IMPORT LEVIES					
Wheat 8/.....	96.13	2.62	-6.97	106.20	
Barley.....	94.52	2.06	-1.48	84.55	
Corn.....	72.04	1.83	-5.74	93.30	
Sorghum.....	69.56	1.77	-3.38	90.90	
Broilers 9/.....	310.00	--	--13/	273.00	
EC INTERVENTION PRICES 11/					
Common wheat(feed quality)	185.34	5.04	-1.24	189.45	
Bread wheat.....	203.28	5.53	-1.35	217.54	
Barley and all					
other feed grains.....	185.34	--	-1.24	189.45	
Broilers 12/.....	1104.00	--	-35.00	N.Q.	
EC EXPORT RESTITUTIONS (subsidies)					
Wheat.....	61.66	1.68	-3.80	66.37	
Wheat flour.....	N.Q.	N.Q.	N.Q.	N.Q.	
Barley.....	N.A.	--	--	N.Q.	
Broilers 9/.....	209.00	--	-- 13/	171.00	
Sugar, refined 14/.....	N.Q.	--	N.Q.	N.Q.	

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Optional delivery: Argentine Granifero sorghum. 3/ Optional delivery: Canadian feed barley. 4/ Optional delivery: Argentine. 5/ Based on selected major markets and adjusted to reflect farm prices more closely. 6/ Hundredweight (CWT). 7/ Nine-city, wholesale weighted average. 8/ Durum has a special levy. 9/ EC category--70 percent whole chicken. 10/ Reflects exchange rate change and not level set by EC. 11/ Reflects change by EC effective Feb. 1, 1983 from 31.8 ECU's/100 kg to 33.15. 12/ F.o.b price for R.T.C. whole broilers at West German border. 13/ Change from previous week generally reflects change in exchange rates. N.Q.=Not quoted. N.A.=None authorized. Note: Basis May delivery.

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<b>8</b> Horticultural Products Review	<b>8</b> Horticultural Products Review	<b>8</b> Horticultural Products Review	<b>11</b> Horticultural Products Review	<b>4</b> World Meat Situation/Outlook	<b>8</b> Horticultural Products Review
World Coffee Situation	<b>11</b> World Crop Production <sup>1</sup>	<b>12</b> World Crop Production <sup>1</sup>	<b>12</b> World Crop Production <sup>1</sup>	<b>8</b> Horticultural Products Review	<b>12</b> World Crop Production <sup>1</sup>
<b>12</b> World Crop Production <sup>1</sup>	<b>12</b> World Agricultural Supply/Demand <sup>2</sup>	<b>13</b> World Agricultural Supply/Demand <sup>2</sup>	<b>13</b> World Agricultural Supply/Demand <sup>2</sup>	<b>9</b> World Sugar & Molasses Situation	<b>13</b> World Agricultural Supply/Demand <sup>2</sup>
World Agricultural Supply/Demand <sup>2</sup>	USSR Grain Situation/Outlook	USSR Grain Situation/Outlook	USSR Grain Situation/Outlook	<b>10</b> World Crop Production <sup>1</sup>	USSR Grain Situation/Outlook
World Tobacco Situation	World Tobacco Situation	World Tobacco Situation	<b>14</b> World Grain Situation/Outlook	World Crop Production <sup>1</sup>	World Tobacco Situation
USSR Grain Situation/Outlook	<b>15</b> World Grain Situation/Outlook	<b>14</b> World Grain Situation/Outlook	World Tobacco Situation	<b>14</b> World Agricultural Supply/Demand <sup>2</sup>	<b>14</b> World Grain Situation/Outlook
<b>14</b> World Grain Situation/Outlook	<b>16</b> Agricultural Export Outlook <sup>3</sup>	<b>19</b> World Cotton Situation	<b>19</b> World Cotton Situation	USSR Grain Situation/Outlook	<b>15</b> World Dairy Situation/Outlook
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			<b>31</b> Agricultural Export Outlook <sup>3</sup>	<b>29</b> Export Markets for U.S. Grains	

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<sup>1</sup> Available from FAS, Information Division, Room 5918 South Building.

<sup>2</sup> Prepared jointly by USDA's Foreign Agricultural Service, Economic Research Service and the World Agricultural Outlook Board. Limited number of copies and subscription information are available from the World Agricultural Outlook Board Room 5143 South Building, Washington, D.C. 20250. Telephone (202) 447-5447.

<sup>3</sup> On day of release copies available from USDA Press Service.



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